
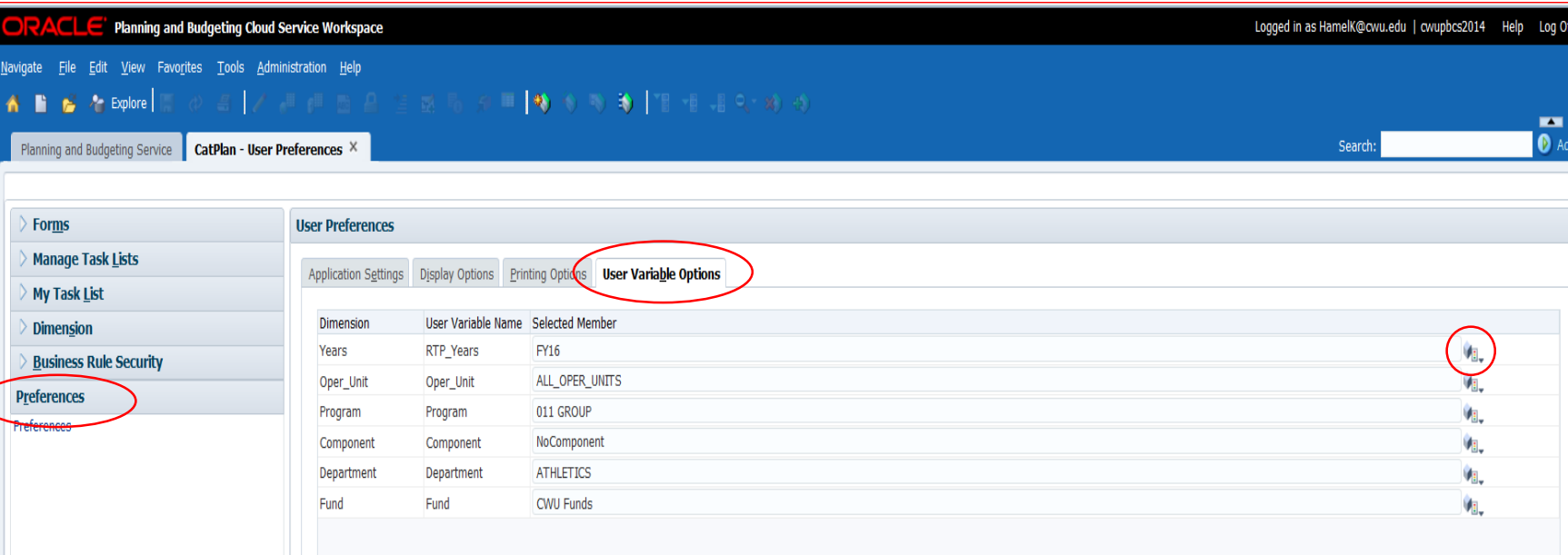


Setting User Preferences (Allows you to narrow down your menu of options when Navigating Forms):

- 1) Run a Valid Budget Combinations Report in CatPlan to determine all possible Chart strings for your area (all Programs, Funds, Departments, Components, and Operating Units)
 - 2) Click on Preferences (Bottom left hand column)
 - 3) Click on 4th Tab (User Variable Options)
 - 4) Click on the far right boxes with Down Arrow  for each Dimension
 - a) Years (select FY16)
 - b) Oper_Unit (select ALL_OPER_UNITS). Even if you primary budget is in a particular Operating Unit it is a good idea to select all in order to be able to see any transactions that might have been posted to the incorrect Operating Unit.
 - c) Program – select the individual programs or groups of Programs
 - d) Component – select either the individual component, group of components, or NoComponent
 - e) Department – select either the individual department or group of departments.
 - f) Fund – select either the individual Fund or CWU Funds (for all Funds)
- *NOTE: Only 1 selection can be made for each (either a single department, fund, program, or a grouping of departments, etc.)



ORACLE Planning and Budgeting Cloud Service Workspace

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

Navigate File Edit View Favorites Tools Administration Help

Planning and Budgeting Service CatPlan - User Preferences x Search: []

Forms
Manage Task Lists
My Task List
Dimension
Business Rule Security
Preferences
Preferences

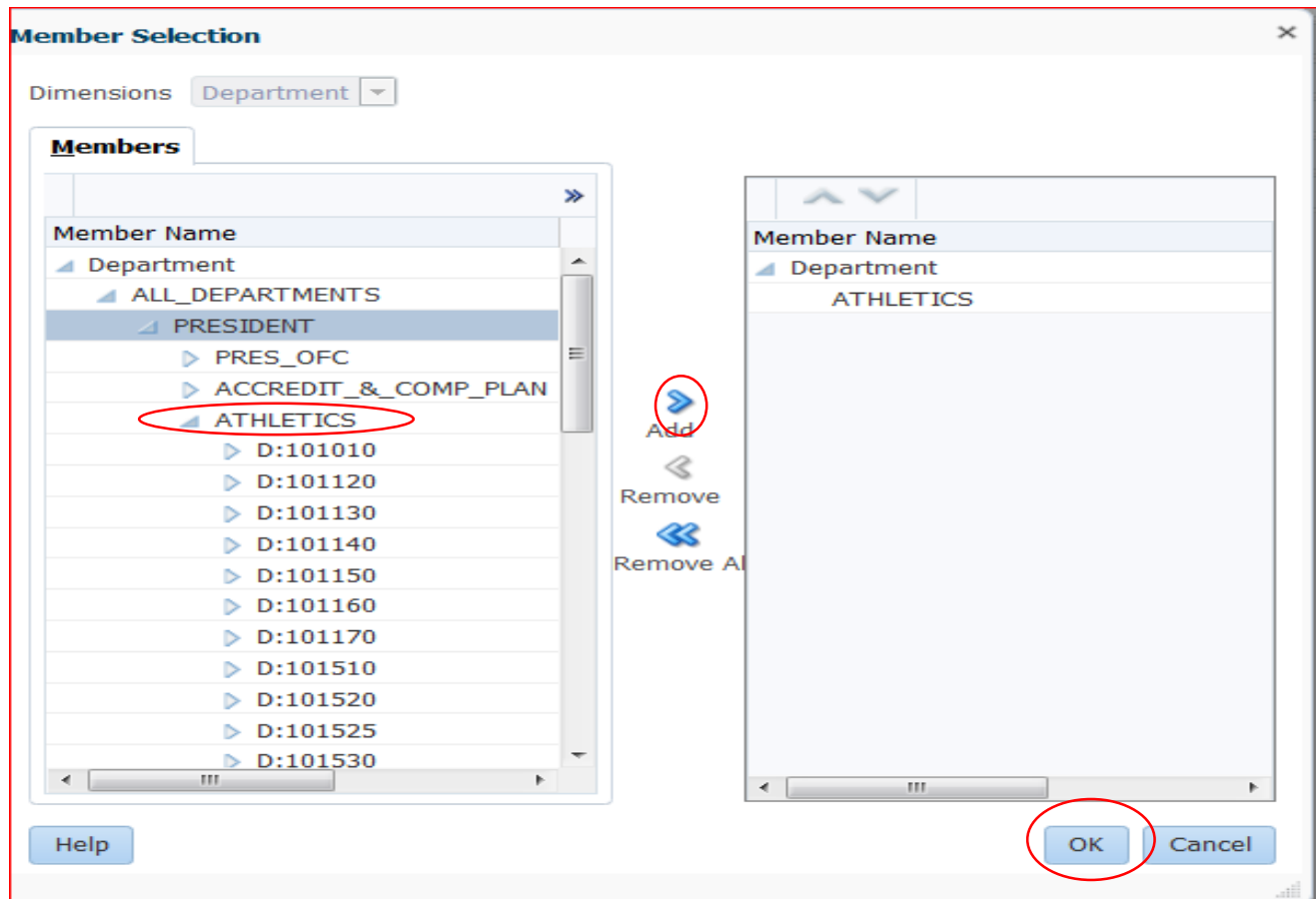
User Preferences

Application Settings Display Options Printing Options **User Variable Options**

Dimension	User Variable Name	Selected Member	
Years	RTP_Years	FY16	
Oper_Unit	Oper_Unit	ALL_OPER_UNITS	
Program	Program	011 GROUP	
Component	Component	NoComponent	
Department	Department	ATHLETICS	
Fund	Fund	CWU Funds	

Example Selecting Group of Departments (Athletics)

1) Find selection, click on > Add and then select OK



Once your selections are made in Preferences, navigate to the Planner-Monthly Task List (expand the menu to see the forms by clicking on the >

Select either the State General Funds Forms – User Specific or the Self Support Forms-User Specific (click on the Form title)

Task List Status

Task - State General Funds Forms-User Specific

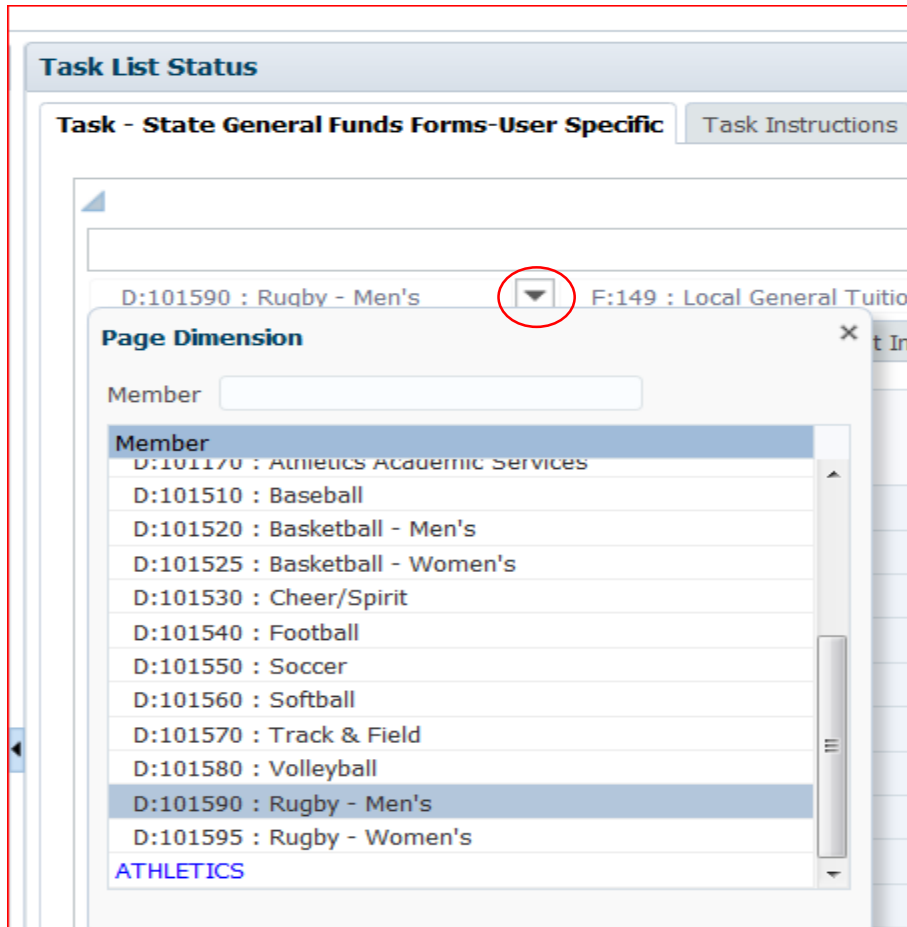
Project: NoProject: No Project

D:101590 : Rugby - Men's F:149 : Local General Tuition P:011 : Inst & Dept Res - Gen'L NoComponent : No Component

Revenue and Expense Review-User Specific

				FY16		Years
				OU:0 University Wide	OU:1 Ellensburg Campus	Total
Jul	50: CWU-Expense	Final	Actual		574	574
Aug	50: CWU-Expense	Final	Actual	0	4,507	4,507
Sep	50: CWU-Expense	Working	Budget		9,827	9,827
Oct	50: CWU-Expense	Working	Budget		9,827	9,827
Nov	50: CWU-Expense	Working	Budget		9,827	9,827
Dec	50: CWU-Expense	Working	Budget		9,827	9,827
Jan	50: CWU-Expense	Working	Budget		9,827	9,827
Feb	50: CWU-Expense	Working	Budget		9,827	9,827
Mar	50: CWU-Expense	Working	Budget		9,827	9,827
Apr	50: CWU-Expense	Working	Budget		9,827	9,827
May	50: CWU-Expense	Working	Budget		9,827	9,827
Jun	50: CWU-Expense	Working	Budget		9,827	9,827
Period	Account	Version	Total Actual + Working Expenses	0	103,353.2	103,353.2
TotalYear	40: CWU-Resources	Working	Budget		(115,000)	(115,000)
Period	Account	Version	Net	0	(11,646.8)	(11,646.8)

The menu for each Dimension now only shows the population of Departments, Funds, Components and Programs that you have selected (in this example only Athletics Departments are in the menu of choices).



NOTE: If you want to navigate to a budget that was not selected in your preferences, you can still see the menus with all options by selecting either the State General Funds Forms – All budgets or Self Support Funds Forms – All Budgets

Task List Status

Task - State General Funds Forms-User Specific

Project: NoProject: No Project

D:101590 : Rugby - Men's | F:149 : Local General Tuition | P:011 : Inst & Dept Res - Gen'L | NoComponent : No Component

Revenue and Expense Review-User Specific

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Period	Account	Version	Total Actual + Working Expenses	0	103,353.2	103,353.2
TotalYear	40: CWU-Resources	Working	Budget		(115,000)	(115,000)
Period	Account	Version	Net	0	(11,646.8)	(11,646.8)